



NEW HAVEN PUBLIC SCHOOLS

Operations Memorandum

To: New Haven Board of Education Finance and Operations Committee

From: Thomas Lamb, Chief Operating Officer

Date: January 25, 2024

Re: Purchase Order under CREC with Facilities Management Express, LLC to provide work order management software for facilities dept.

Answer all questions and have a representative ready to present the details of each question during the Finance & Operations meeting or this proposal may not be advanced for consideration by the full Board of Education.

Company Information		
Vendor Name:	Facilities Management Express, LLC	
Doing Business as: (DBA)		
Vendor Address:	800 Yard St, Suite 115 Columbus, OH 43212	
Vendor Contact Name:	Austin Jacobs	
Vendor Contact Email:	Austin.jacobs@gofmx.com	
Is the contractor a minority or women owned small business?	No	
Agreement/Contract Information		
New or Renewal Agreement/Contract?	Purchase Order	
Effective Dates: (mm/dd/yy) <small>Multi-yrs. require Board of Aldermen approval</small>	From 02/05/2024	To 06/30/2024
Total Amount: <small>If Multi-yr. include yr. to yr. breakdown</small>	\$44,288.99	
Funding Source Name: Acct. #:	2023-2024 Operating budget 190-47000-56694	
Contract #: <small>(Local or State)</small>	CREC	



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Key Questions:

1. What specific service will the contractor provide:

to provide a Work Order management system for Facilities related work orders

2. How was the contractor selected? **Attach appropriate supporting documents*

- Quotes
- Sealed Bid # _____
- Sole Source # _____
- RFP# _____
- CREC Contract
- Exempt Professional
 - Accountant
 - Actuary
 - Appraiser
 - Architect
 - Artist
 - Dentist
 - Engineer
 - Expert Professional Consultant
 - Land Surveyor
 - Lawyer
 - Physician/Medical Doctor

3. If the vendor was selected through Solicitation (Bid/RFQ/RFP) process; answer the following:

a. Please explain how the vendor was chosen? **Attach Vendor Proposal*

N/A

b. Who were the members of the selection committee? *(Minimum 3 members required)*

N/A



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4. If this is a renewal with a current vendor, has the vendor has met all obligations under the existing agreement/contract?
N/A
5. If this agreement/contract is a Renewal, has the cost increase? If yes, by how much? <small>*Attach Renewal Letters</small>
N/A
6. If this new agreement/contract, has cost for service increased from previous years? If yes, by how much?
These services have a increase of 4.21% from the previous vendor utilized, however with this newer platform available. The district will have greater access to customer service and optimization of work orders placed and managed.
7. Is this a service that existing staff could provide? Why or why not?
No, this is a software provided by a CREC vetted vendor.



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Agreement/Contract Processing Checklist

To ensure timely processing of the submitted Agreement/Contract it is imperative to collect and provide all of the required documentation noted below and provide with submission to board.

Forms/Documents are available in: Drive G:\F&O Agenda Minutes\Agreement_Contract_Checklist\2022-2023

1. Has this vendor performed service(s) in prior fiscal years?	
If Yes,	Vendor # _____
If No or New,	Vendor must provide completed W9
2. A quotes or proposal submitting regarding the agreement/contract.	
If RFP	Attach Vendor Submitted
Other	Copy of State Contract, Quotes, etc.
<p>3. <u>Certificates of Liability Insurance (COI) are required for ALL agreements/contracts, read the following and select the applicable Rider.</u></p> <p>It is the submitters responsibility to request the COI from the vendor and attach with submission; the COI from the Vendor <u>must match rider specifications outlined.</u></p> <p>Failure to obtain or incorrect COIs will be returned for revision and will delay its processing.</p>	
Rider 300	Professional Services – Onsite Umbrella; w/ Auto; w/ Workers Compensation
Rider 305	Professional Services – Onsite Umbrella; No Auto; No Workers Compensation
Rider 310	Professional Services – Onsite Umbrella; w/ Auto; No Workers Compensation
Rider 315	Professional Services – Onsite Umbrella; w/ Youth under 21
Rider 320	Professional Services – Offsite; No Auto; No Workers Compensation
Rider 325	Professional Services – Offsite; No Auto; No Workers Compensation; w/ Youth under 21
Rider 330	Professional Services – Offsite Attorney; No Auto; No Workers Compensation
Rider 335	Professional Services – Onsite; Physician/Dentist; No Auto
Rider 340	Professional Services – Onsite Physician/Dentist w/ Youth under 21
Rider 345	Professional Services – Onsite Temp Nurses
Rider 350	Professional Services – Cyber – Onsite
Rider 355	Professional Services – Cyber – Offsite
<p>4. The City of New Haven requires the information requested in the <u>Disclosure Affidavit</u> before any City agency, department, or city official seeking agreement/contract shall obtain them, notarized.</p> <p>Emailed Disclosures are acceptable.</p>	



www.gofmx.com
1 (844) 664-4400
800 Yard St., Suite 115
Columbus, OH 43212

Subscription Summary

Contact Information

Name: Thomas Lamb
Email: thomas.lamb@new-haven.k12.ct.us
Account: New Haven Public Schools
Phone: 475-220-1590
Address: 54 Meadow St, New Haven,
Connecticut, United States, 06519

Sales Order Information

Expiration Date: Mar 29, 2024
Prepared By (Name): Austin Jacobs
Prepared By (Email): austin.jacobs@gofmx.com
Contract Start Date: Mar 1, 2024
Contract End Date: Jun 30, 2024

Payment Terms: Net 30

Item Name	Feature Name	Line Item Notes	Net Price
Custom Work Request Module	Project Requests		\$5,424.16
Custom Work Request Module	Security		\$5,424.16
Custom Work Request Module	Supply		\$5,424.16
Feature	Invoicing		\$3,874.40
Feature	Preventive Maintenance		\$5,424.16
Feature	Schedule Request		\$7,555.08
Feature	Commissioned Reports		\$1,937.20
Feature	Inventory		\$2,905.80
Feature	Standard Dashboards		\$3,874.40
Feature	Maintenance Request		\$5,424.16
FMX Implementation & Training Fee	Implementation & Training Fee		\$27,652.20
FMX Proration	FMX Proration		(\$33,137.21)
FMX Recurring Discount	AEPA Discount		(\$5,530.40)
FMX Subscription Fee	FMX Subscription Fee		\$3,000.00
Interactive Mapping	FMX Interactive Mapping		\$5,036.72
Total Net Price			\$44,288.99

By signing this Sales Order, you are agreeing to the [FMX Terms of Use](#) as incorporated herein.

New Haven Public Schools	
Name	
Title	
Signature	
Date	



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

1/18/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

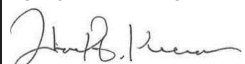
PRODUCER License # 1529 The Keenan Agency 6805 Avery Muirfield Drive Suite 200 Dublin, OH 43016	CONTACT Cindy de Leon-Smith, Senior Commercial Lines Account Manager NAME: PHONE (A/C, No, Ext): _____ FAX (A/C, No): _____ E-MAIL ADDRESS: cdeleon-smith@keenanins.com	
	INSURER(S) AFFORDING COVERAGE	
INSURED FACILITIES MANAGEMENT EXPRESS LLC 800 YARD STREET, STE 115 GRANDVIEW HEIGHTS, OH 43212	INSURER A : VALLEY FORGE INSURANCE COMPANY NAIC # 20508	
	INSURER B : CONTINENTAL CAS CO 35289	
	INSURER C : BEAZLEY USA SERVCIES Inc. 37540	
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	X	X	6025082990	1/10/2024	1/10/2025	EACH OCCURRENCE	\$ 2,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 1,000,000
							MED EXP (Any one person)	\$ 10,000
							PERSONAL & ADV INJURY	\$ 2,000,000
							GENERAL AGGREGATE	\$ 4,000,000
							PRODUCTS - COMP/OP AGG	\$ 4,000,000
								\$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			6025082990	1/10/2024	1/10/2025	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
							\$	
B	X UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR X EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000	X	X	7034105103	1/10/2024	1/10/2025	EACH OCCURRENCE	\$ 1,000,000
							AGGREGATE	\$ 1,000,000
							\$	
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below			6025082990	1/10/2024	1/10/2025	<input type="checkbox"/> PER STATUTE <input checked="" type="checkbox"/> OTH-ER	
							E.L. EACH ACCIDENT	\$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000
							E.L. DISEASE - POLICY LIMIT	\$ 1,000,000
C	Professional Liab			W15C4721801	6/6/2023	6/6/2024	Per Claim	2,000,000
C	Cyber Liability			W15C4721801	6/6/2023	6/6/2024	Aggregate	2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER CITY OF NEW HAVEN 200 Orange Street Rm 301 New Haven, CT 06510	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

RFP NO. 24-D

AEPA | Part D Questionnaire

Prepared by Facilities Management Express (FMX)

Delivered by

Marc Stitt, Chief Strategy Officer, FMX
614.309.5998 | marc.stitt@gofmx.com

September 7, 2023



Facilities Management Express

800 Yard St #115
Grandview Heights, OH 43212

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Company Information

Name of Company: Facilities Management Express (dba FMX)

Company Address: 800 Yard Street Suite 115

City, State, zip code: Columbus, OH 43212

Website: www.gofmx.com

Contact Person: Marc Stitt

Title: Chief Strategy Officer

Phone: 614.309.5998

Email: marc.stitt@gofmx.com

Background

Note: Generally, AEPA will not accept an offer from a business that is less than five (5) years old or which fails to demonstrate and/or establish a proven record of business. If the respondent has recently purchased an established business or has proof of prior success in either this business or a closely related business, provide written documentation and verification in response to the questions below. AEPA reserves the right to accept or reject newly formed companies based on information provided in this response and from its investigation of the company.

This business is a: public company privately owned company

In what year was this business started under its present name? 2012

Under what additional, or, former name(s) has your business operated? _____

Is this business a corporation? No Yes. If yes, complete the following:

Date of Incorporation: _____

State of Incorporation: _____

Name of President: Brian Gregory

Name(s) of Vice President(s): Marc Stitt

Name of Treasurer: Jack Haslup

Name of Secretary: Sandy Widders



Is this business a partnership? No Yes. If yes, complete the following:
Date of Partnership: _____
State Founded: _____
Type of Partnership, if applicable: _____
Name(s) of General Partner(s): _____

Is this business individually owned? No Yes. If yes, complete the following:
Date of Purchase: _____
State Founded: _____
Name of Owner/Operator: _____

Is this business different from those identified above? No Yes
If yes, describe the company's format, year and state of origin and names and titles of the principles below.
FMX is an LLC with principles noted: Jeff Wilkins, Brian Gregory, Todd Mace, Joe Onofrio (Five Elms Capital)

Is this business women-owned? No Yes

Is this business minority-owned? No Yes

Does this business have an Affirmative Action plan/statement? No Yes

Business Headquarter Location

Business Address: 800 Yard Street, Suite 115
City, State, zip code: Columbus, OH 43212
Phone: (844) 664-4400
How long at this address? 6 Years

Business Branch Location(s)

Branch Address: _____
City, State, zip code: _____
Branch Address: _____
City, State, zip code: _____
Branch Address: _____
City, State, zip code: _____
Branch Address: _____
City, State, zip code: _____

**If more branch locations exist, insert information here or add another sheet with the above information.*

Sales History

Provide your business's annual sales for in the United States by the various public segments.



	2021	2022	2023 YTD
K-12 (public & private), Educational Service Agencies	N/A	N/A	N/A
Higher Education Institutions	N/A	N/A	N/A
Counties, Cities, Townships, Villages	N/A	N/A	N/A
States	N/A	N/A	N/A
Other Public Sector & Non-profits	N/A	N/A	N/A
Private Sector	N/A	N/A	N/A
Total	N/A	N/A	N/A

Provide your business's annual sales for **products and services that meet this solicitation's scope of work** in the United States by the various public segments.

	2021	2022	2023 YTD
K-12 (public & private), Educational Service Agencies	N/A	N/A	N/A
Higher Education Institutions	N/A	N/A	N/A
Counties, Cities, Townships, Villages	N/A	N/A	N/A
States	N/A	N/A	N/A
Other Public Sector & Non-profits	N/A	N/A	N/A
Private Sector	N/A	N/A	N/A
Total	N/A	N/A	N/A

Note: As a private company, FMX does not disclose this information a matter of policy.

Work Force				
Key Contacts and Providers: Provide a list of the individuals, titles, and contact information for the individuals who will provide the following services on a national and/or local basis:				
Function	Name	Title	Phone	Email
Contract Manager	Sandy Widders	Controller	614.620.0984	sandy.widders@gofmx.com
Sales Manager	Mike Manuche	VP Sales	614.420.6732	mike.manuche@gofmx.com
Marketing Manager	Alayna McCurry	VP Marketing	740.816.9684	alayna.mccurry@gofmx.com
Customer & Support Manager	Brandi Templeton	VP Customer Success	614.940.8451	brandi.templeton@gofmx.com
Distributors, Dealers, Installers, Sales Reps	Mike Manuche	VP Sales	614.420.6732	mike.manuche@gofmx.com
Consultants & Trainers	Darin Porter	Executive Director	740.935.5682	darin.porter@gofmx.com
Technical, Maintenance & Support Services	Ethan Day	Director, Customer Support	614.569.0401	ethan.day@gofmx.com



Quotes, Invoicing & Payments	Sandy Widders	Controller	614.620.0984	sandy.widders@gofmx.com
Warranty & After the Sale	Brandi Templeton	VP Customer Success	614.940.8451	brandi.templeton@gofmx.com
Financial Manager	Jack Haslup	VP Finance	614.915.9016	jack.haslup@gofmx.com

Sales Force: Provide total number and location of salespersons employed by your business in the United States by completing the following: <i>(To insert more rows, hit the tab key from the last field in the State column.)</i>		
Number of Sales Reps	City	State
14	Columbus	Ohio
1	Denver	Colorado
1	Baltimore	Maryland
1	Akron	Ohio
1	Philadelphia	Pennsylvania

Describe how your company will implement training and knowledge of the contract with your respective sales force. Furthermore, describe how your company plans to support and train your sales force on a national, regional, or local level and generally assist with the education of sales personnel about the resulting contract.

FMX leadership has extensive experience managing national and global programs of this type. In the event FMX is awarded a contract for CMMS Software as a result of this RFP, our Chief Strategy Officer (CSO) and VP of Revenue Operations will partner to deliver an extensive training and knowledge management program for our sales force and all members of the organization who may interact with the AEPA and/or its member organizations. Example content includes live training, recorded modules for reference, “how to” datasheets, and frequently asked questions (FAQ) documentation.

What is your company’s plan, if your company were awarded the contract, to service up to 29 states. Describe if your company has a national sales force, dealer network, or distributor(s) with the ability to call on eligible agencies in the participating states in AEPA.

FMX is fully prepared to support and service the 29 states - and any other states/regions - in the event of this contract award. Our direct sales organization operates in a regional, territory-based model that allows us to serve organizations across the country. Further, we have the scale and capacity to engage in other partnerships with agencies who work within and beyond the AEPA should that be required for any reason.



Products, Services & Solutions

Provide a description of the Products, Services & Solutions to be provided by the product category set forth in Part B - Specifications. The primary objective is for each Supplier to provide its complete product, service, and solutions offerings that fall within the scope of this solicitation so that participating agencies may order a range of products as appropriate for their needs.

FMX is a leading provider of purpose-built solutions for facilities, maintenance and operations. We are proud to serve more than 900 education organizations across the country spanning K-12 and Higher Education environments. Our solution set is highly modular and highly configurable, meaning we can meet each customer organization where they are and help them evolve further. We offer market-leading ease-of-use and boast a 99% customer satisfaction rating, an industry best. Below you can explore more about our extensive solution set.

Functionality

Provide a listing of modules for your product and what specifications from Section 5 are included in each.

FMX is pleased to share this system and capabilities overview.

Maintenance Requests

Submit, prioritize and assign work requests across your organization to streamline communication and resolve issues faster. With Maintenance Requests, users will never have to worry about manually managing work order requests. FMX makes it quick and easy for requesters to submit work orders and stay up to date on progress. At the same time, staff can focus on resolving work orders with all the information they need right from their mobile device.



Maintenance Requests

Search: [] Saved Filter Clear Approve Assign Delete Resolve Export Settings

Status: Open

Name	Building	Type	Opened	Due	Status	Cost	Assigned users	Resolved	Resolver
Sink overflowing	Main Building	Plumbing	Wed, Mar 15, 2023, 12:28pm	Fri, Mar 17, 2023	Pending assignment	-	-	-	-
Water Leak Detected	Main Building	Plumbing	Mon, Apr 10, 2023, 11:23am	Mon, Apr 10, 2023	Pending assignment	-	-	-	-
Electric Issue	Main Building	Electrical	Wed, Apr 19, 2023, 9:43am	Wed, Apr 19, 2023	Pending assignment	-	-	-	-
Change Lightbulb	Main Building	Electrical	Wed, Jun 7, 2023, 2:43pm	Fri, Jun 30, 2023	Pending resolution On hold	-	Technician	-	-
Test Approval Ticket	Main Building	Electrical	Tue, Jul 11, 2023, 3:22pm	Tue, Jul 11, 2023	Pending assignment	-	-	-	-
Test Approval 2	Main Building	General	Tue, Jul 11, 2023, 3:24pm	Fri, Jul 14, 2023	Pending assignment	-	-	-	-

Showing 1-19 of 19 records Page 1 of 1

Key capabilities

- Use Calendar & To-Do views to easily see schedules, upcoming tasks, and resolve conflicts by drag and drop rescheduling.
- Communicate in-app to directly update requestors, other technicians, vendors, and more.
- Save time with auto-assignment & notifications by assigning the technician best suited to the task and sending real-time updates.
- Configure custom request forms to ensure all relevant details are captured to complete the job - attach photos, videos, documents, and more.
- Use your mobile device to quickly submit requests and ensure technicians can access all the information they need to resolve work orders.
- Utilize QR code equipment tagging to submit requests, see work order history, or view equipment information.
- Gather actionable insights with interactive reporting & dashboards that track metrics like downtime, equipment repair cost, labor time and cost, and more.

Preventive Maintenance

Prevent costly equipment issues, and ensure your equipment is operating at peak performance. Use Preventive Maintenance to schedule regular inspections and upkeep tasks to prolong equipment life, reduce downtime, maintain safety, and avoid costly breakdowns.



Name	Type	Instruction set	Buildings	Equipment	Due	Threshold	Last executed	Overdue occurrences
Change HVAC Filters	Preventive Maintenance	HVAC Inspection	Main Building	1451702 - HVAC Unit 2	Fri, Oct 13, 2023	-	Thu, Jul 6, 2023, 9:51am	0
Change HVAC Filter	Preventive Maintenance	-	Main Building	-	Thu, Apr 20, 2023	-	Mon, May 22, 2023, 2:19pm	3
Change HVAC Filters	Preventive Maintenance	-	Main Building	1501538 - Test Production Zone > 1451701 - HVAC Unit 1	Fri, Jul 29, 2022	-	-	5
HVAC Filter Change	Preventive Maintenance	-	Main Building	1455319 - Air Handler	Fri, May 13, 2022	-	Wed, Nov 10, 2021, 12:43pm	4

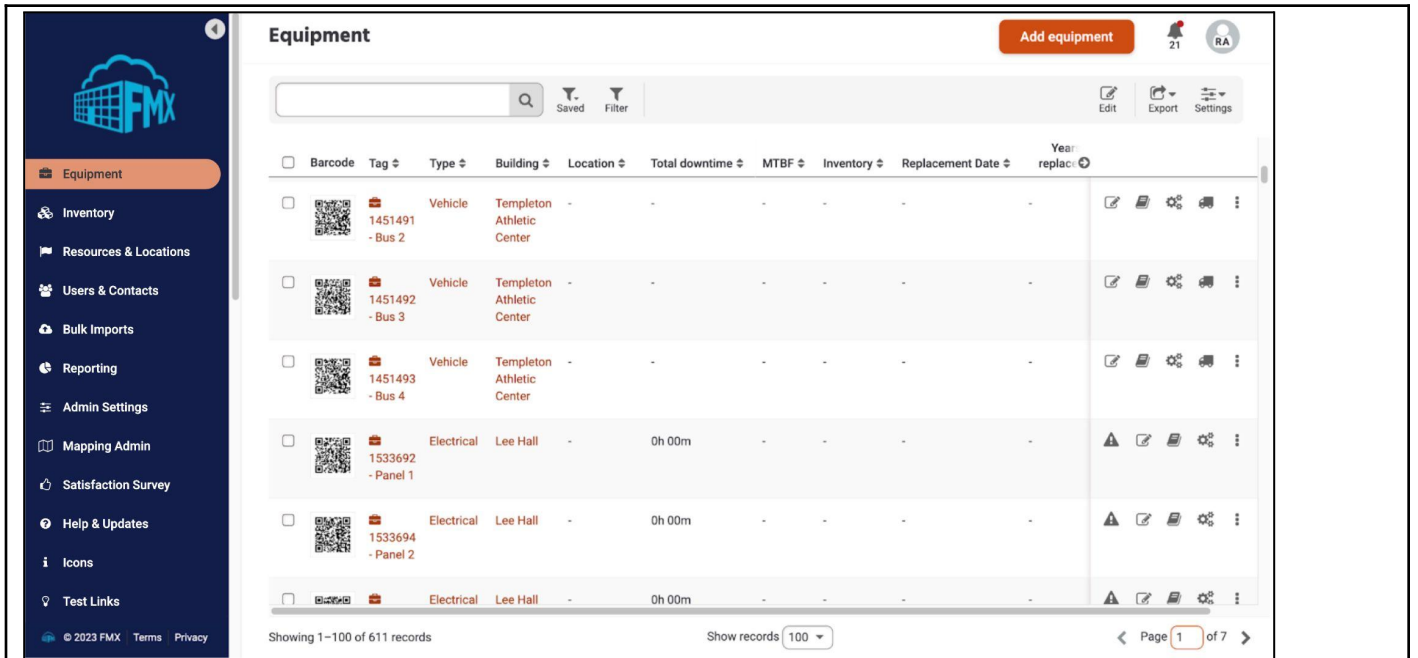
Key capabilities

- Create and apply inspection checklists and instruction sets to tasks to ensure proper regulatory standards, equipment upkeep, and manufacturer-recommended service is completed.
- Schedule regular maintenance tasks using time-based and meter-based intervals. Store important records and other assets by uploading user manuals, warranties, and more.
- View the equipment log to see the previous work history for each equipment item.
- Use your mobile device to ensure technicians can access all the information they need to resolve work orders.
- Gather actionable insights with interactive reporting & dashboards that track metrics like downtime, equipment repair cost, labor time and cost, and more.

Equipment

Get the most value from your assets and equipment. Increase asset lifespans, reduce equipment downtime, and strategically plan capital investments with reliable maintenance software.





Key capabilities

- Centralize work order requests to make it easy for staff to submit, resolve, and see a history of work order requests.
- Schedule regular planned maintenance, like safety inspections, for equipment with time and meter-based intervals.
- Use QR codes to quickly see equipment details, previous work order history, or submit and resolve new work orders.
- Save time by auto-assigning the technician best suited to the task and sending real-time updates.
- View interactive reports and dashboards to see key metrics like costs, inventory usage, completion rates, and more.
- Create instruction sets and inspection checklists for all your inspections, cleanings, and QA testing.
- Integrate BAS, water/humidity/temperature sensor alerts, and more right into FMX to centralize facility operations.

Schedule Requests

Frictionless facility scheduling and equipment reservation software for your organization. FMX keeps stakeholders in the loop regarding events and meetings that matter to them. View which spaces in your facility have been reserved for specific dates and which ones are still available, ensuring no room or resource is double-booked.



Schedule Requests

Requests Occurrences

Search: [] Saved Filter Clear Cancel Invoice Export Settings

Status: Open

Name	Buildings	Resources	Event time	Schedule	Requester	Status
2281087 - Staff Meeting	Main Building	Conference Room A	Thu, Apr 21, 2022, 10:00pm - 11:00pm	Weekly on Thursday, for a month	User	Pending my approval
2281088 - Baseball Game	Campus	Baseball Diamond	Thu, Apr 28, 2022, 8:45am - 2:15pm	Once	User	Pending invoice
2281728 - Meeting	Campus	Baseball Diamond	Mon, May 16, 2022, 10:00am - 11:00am	Once	User	Pending estimate
2283191 - Staff Meeting	Main Building	Conference Room A	Thu, Jul 7, 2022, 11:00am - 1:00pm	Once	User	Pending estimate
2283192 - Interview	Main Building	Conference Room A	Wed, Jul 13, 2022, 11:00am - 1:00pm	Once	User	Pending my approval
2283193 - Staff Planning Meeting	Main Building	Conference Room A	Thu, Jul 21, 2022, 11:00am - 1:00pm	Once	User	Pending my approval

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Key capabilities

- Set up automatic email notifications for relevant individuals when events are scheduled or modified that require their services.
- Allow staff and community members to submit facility or equipment reservations.
- Customize your organization’s scheduling request form to include required fields for custodial services, seating, catering, technology needs, and more.
- Ensure all relevant details are captured with configurable request forms—attach photos, videos, documents, and more.
- Auto-generate reports to monitor financial metrics, facility usage, and other KPIs.
- Use FMX’s calendar to stay on top of upcoming events and reservations.
- Add on Reservation Finder to allow users to search, find, and schedule available rental spaces by location, date, time, building, and more.
- Manage rental invoices and outstanding balances, and collect payment with built-in payment processing powered by Stripe.

Invoicing

Request and collect payment for work performed, facility reservations, and more. FMX enables you to invoice and collect payment from third parties for work you’ve performed, issue invoices for facility rental, and manage invoices for issues related to restitution and damages. With FMX, you can streamline invoicing processes to create or grow your revenue stream.





- Invoices
- Key Requests
- Landscaping Schedule
- Maintenance Requests
- Pest Control Treatments
- Planned Maintenance
- Project Requests
- Purchase Orders
- Research Requests
- Schedule Requests
- Security Requests
- Security Schedules
- Technology Requests
- Technology Tasks

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Invoices

Saved
Filter

New invoice

0
MM

Export
Settings

Invoice #	Module	Recipient	Requests	Occurrences	Due	Status	Grand total	Paid	Remaining balance
475	Schedule request	User	2278731 - Ceremony	2278731 - Ceremony - Mon, Jan 17, 4:00PM	Fri, Jan 21, 2022	Pending payment	\$600.00	\$0.00	\$600.00
479	Schedule request	User	2278757 - Ceremony	2278757 - Ceremony - Mon, Jan 17, 4:00PM	Fri, Jan 21, 2022	Pending payment	\$300.00	\$0.00	\$300.00
669	Schedule request	User	2282616 - Facility Rental	2282616 - Facility Rental - Wed, Jan 1, 5:30PM and 2 others	Thu, Jun 30, 2022	Paid	\$112.50	\$112.50	\$0.00
2108	Schedule request	Requester	2283257 - Outside Event Rental	2283257 - Outside Event Rental - Fri, Jul 15, 2:00PM	Thu, Jun 30, 2022	Pending payment	\$50.00	\$0.00	\$50.00
Totals							\$1,062.50	\$112.50	\$950.00

Showing 1-4 of 4 records
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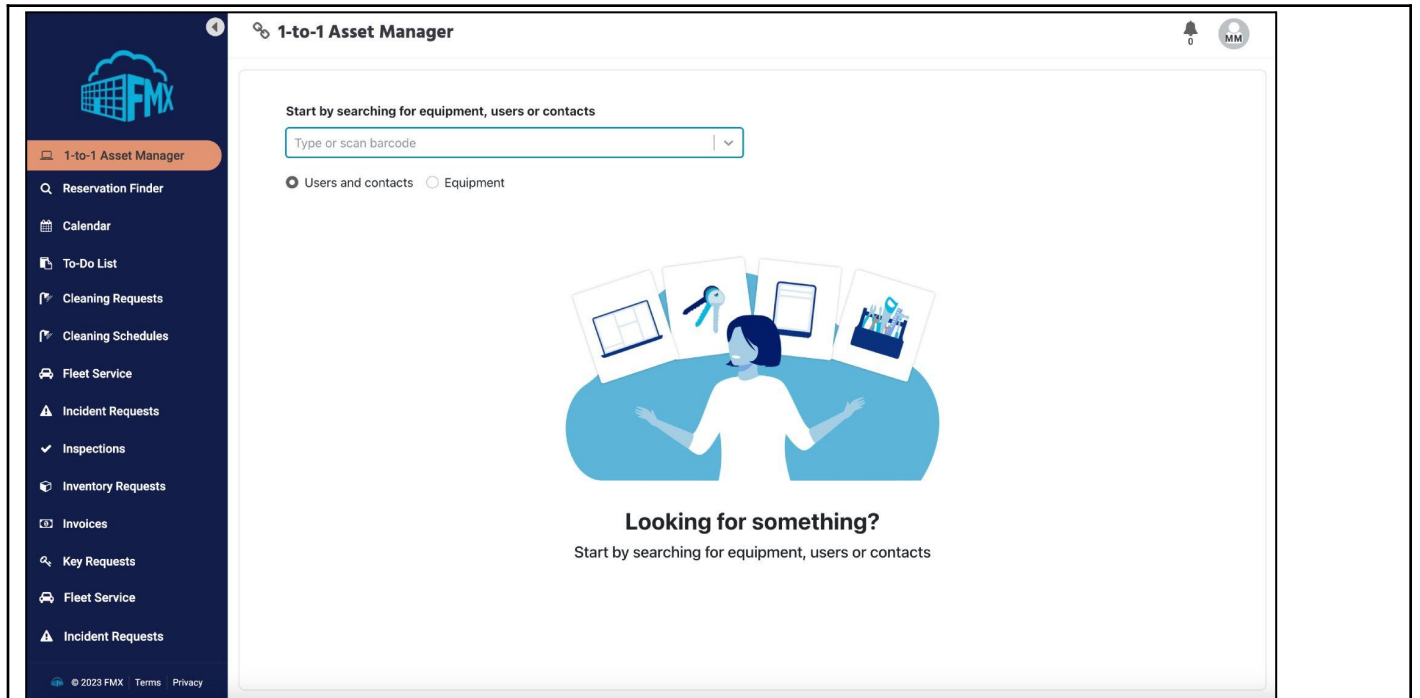
Key capabilities

- Create invoices for single or multiple schedule request occurrences or any stand-alone service.
- Collect online payments using Stripe or by manually recording payment against any invoice.
- Personalize invoices with your desired information and branding.
- Track invoice status and history by the recipient, resources used, or date.
- Directly email invoices from within FMX for optimal communication and flexibility.
- Waive or void invoices, and keep a record of historical data.

1-to-1 Asset Manager

Seamlessly assign and deploy 1-to-1 devices to users in FMX. 1-to-1 Asset Manager makes deployment and collection of organization-owned devices easy. Simply scan devices or user IDs to assign devices, submit IT repair tickets, assign loaner devices, see work order logs, or remove device assignments, all in one interface.

12



Key capabilities

- Scan or type to search for equipment, user barcodes, and contact barcodes to quickly bulk assign, or unassign, devices with one click.
- Search by equipment, users, or contacts to pull up relevant assignment information and view past tickets counts, open ticket counts, or completed work logs.
- Quickly create tickets for equipment or users, and assign loaner devices in the same interface.
- Use existing ID numbers to set barcodes, serial numbers, or other identifiers as default search terms.
- Seamlessly update user, contact, or equipment information after searching.

Technology Requests

Submit IT tickets and technology work orders, and track ticket resolution details in FMX. FMX provides one central location to submit IT tickets, ensuring no request goes missing again. With Technology Requests, all relevant information is stored by request type, quickly assigned to technicians, and updated as tickets progress. Plus, it provides reporting data for ticket resolutions and requests.



Technology Requests

Search: [] Saved Filter Clear Export Settings

Status: Open

Name	Building	Type	Opened	Due	Status	Assigned users	Resolved	Resolver
Computer Won't Turn On	Main Building	IT Request	Thu, Apr 14, 2022, 8:54am	Fri, Apr 15, 2022	Pending assignment	-	-	-
IT Request	Main Building	IT Request	Thu, Apr 14, 2022, 1:42pm	Tue, Apr 19, 2022	Pending assignment	-	-	-
Computer Troubleshooting	Main Building	IT Request	Fri, Apr 15, 2022, 2:20pm	Fri, Apr 22, 2022	Pending assignment	-	-	-
Screen appears to be cracked	Main Building	IT Request	Thu, Apr 21, 2022, 11:34am	Mon, Apr 18, 2022	Pending assignment	-	-	-
Computer screen stuck on black - maybe virus?	Main Building	IT Request	Thu, Apr 21, 2022, 11:35am	Thu, Apr 21, 2022	Pending assignment	-	-	-
Password Change	Main Building	IT Request	Tue, May 10, 2022, 11:35am	Thu, May 5, 2022	Pending assignment	-	-	-
Router Update	North Building	IT Request	Tue, May 10, 2022, 11:36am	Mon, Apr 25, 2022	Pending assignment	-	-	-
Fix Printer	Main Building	IT Request	Tue, Aug 30, 2022, 10:08am	Wed, Aug 31, 2022	Pending assignment	-	-	-
Space Bar Not Working	Main	IT Request	Fri, Sep 2, 2022	Mon, Sep	Pending assignment	-	-	-

Showing 1–16 of 16 records

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Key capabilities

- Configure custom request forms to ensure all relevant details needed to complete the job are on hand—attach photos, videos, documents, and more.
- Save time with auto-assignment & notifications by assigning the technician best suited to the task and sending real-time updates.
- Communicate in-app directly with requestors, staff members, other technicians, vendors, and more to stay updated on each ticket status.
- Log work hours to see costs associated with technology tickets.
- View reporting and interactive dashboards for comprehensive cost data, resolution rates, equipment maintenance trends, and other insights.
- Use Calendar & To-Do views to make it easy to see open requests and due dates for each technician.
- View data logs to access past requests and resolution details, and view submission history for each user, location, building, and piece of technology equipment.

Trip Requests

Schedule transportation, drivers, and plan trip details for field trips, athletics, and more. Scheduling a field trip or heading out of town for a game? Schedule vehicles and drivers, and record details like drop-off locations, chaperones, trip times, mileage, and more. Never scramble for last-minute accommodations again.



Transportation Requests

Buttons: New transportation request, Export, Settings

Filters: Status: Open

Name	Destination	Time	Pickup location	Miles
Zoo	Zoo	Thu, Jun 30, 2022, 12:00pm - 6:45pm	Front Doors	0
Basketball Game	Rival School	Wed, Jun 29, 2022, 12:00pm - 1:00pm	Front Doors	0
Zoo trip	Columbus Zoo	Wed, Jun 29, 2022, 9:00am - 1:45pm	Front Doors	0
test	Zoo	Tue, Jun 28, 2022, 12:00pm - 1:00pm	Front Doors	0
Zoo Trip	Heading to the Columbus Zoo	Fri, Apr 30, 2021, 8:00am - 1:00pm	Front of Building - ES	0
Football game	Field	Wed, Apr 21, 2021, 11:00am - 12:00pm	Gym doors	0
2nd grade field trip	Science museum	Wed, Dec 18, 2019, 7:30am - 2:00pm	Front of Building - ES	0
Zoo Trip	Columbus Zoo	Sat, Aug 24, 2019, 9:30am - 2:00pm	Front of Building - HS	0
Field Trip - Columbus Zoo	The Columbus Zoo	Tue, Apr 30, 2019, 10:00am - 3:00pm	Front of Building - HS	0
Totals				-

Showing 1-9 of 9 records

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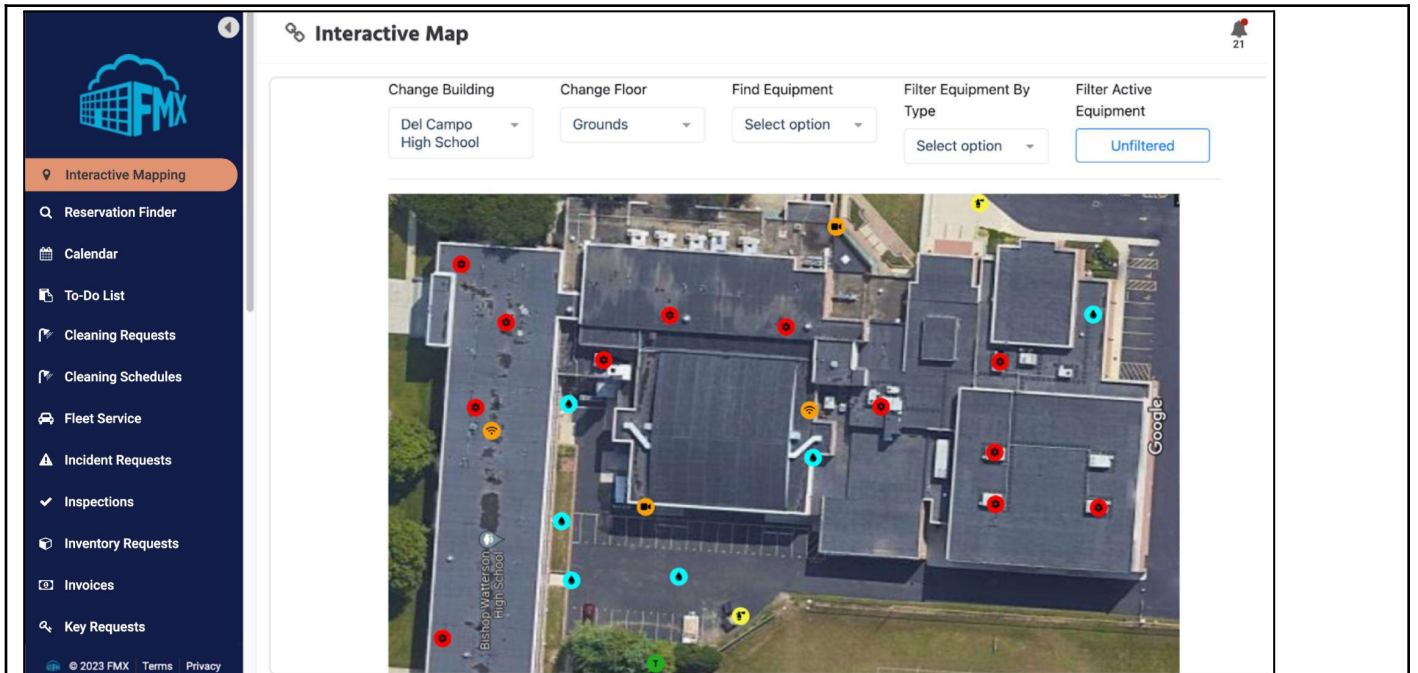
Key capabilities

- Generate and print trip tickets with all the details drivers need before the trip.
- Customize your organization's transportation request form to capture all the necessary information in one place.
- Receive and approve transportation requests, and set up approval chains within FMX to ensure proper communication across staff.
- Request and schedule transportation in advance to ensure drivers are available and know their schedule.
- View reporting and interactive dashboards on transportation costs.
- Log take-off time, return time, and mileage for each trip to ensure vehicle use information is up to date.
- Upload photo and file attachments such as itineraries, trip rosters, allergy information, map directions, safety documents, and more in FMX for easy access.

Interactive Mapping

Quickly locate equipment across your organization with a visual guide using maps, floor plans, and more. Using Interactive Mapping, employees will have an easy-to-update and interactive guide of where assets are located across an organization which is critical to deploy the right people, at the right time, to the right locations.





Key capabilities

- Quickly search and locate specific assets: filter by specific equipment type, or see a holistic view of all equipment locations within a building or floor.
- Create a curated view of items by filtering equipment categories.
- Filter the map to open or overdue work orders and see the exact location of assets on the map to see a birds-eye view and inform efficient maintenance routes.
- Quickly move asset pins from one location to the next to track mobile equipment.

Reporting & Dashboards

Capture, analyze, and discover actionable insights. With FMX, you can understand equipment repair trends, analyze labor cost and time, justify capital improvements, and plan your organization's budget expenditure.





Key capabilities

- Interactive dashboards and filtering tools
- Insights on work orders, labor, equipment, inventory, invoicing, and capital forecasting
- Filterable by request type, building & location, date range, work state, user, and module
- Export for print and email distribution
- Standard dashboards for costs, operations, downtime, equipment, building usage, inventory usage, team performance, and work completed
- Custom-built reports can be purchased as an add-on

Facility Condition Assessment (FCA)

FMX provides a turnkey facilities condition assessment, preventive maintenance schedule, and capital forecasting report.

Reveal the condition, capacity, and lifespan of your HVAC, plumbing, and electrical systems.

- Gain a watchlist of items in poor condition to prevent the risk of sudden failure.
- Build a deferred maintenance backlog of assets past their expected lifespan.
- Measure each asset's individual capacity to optimize its usage.

Professional services

The following services are **not*** included with the standard implementation:



Onsite Training

The FMX Customer Success Team will go to Customer's location for training on the FMX software.

SQL Update

Allows bulk actions to be performed by FMX Customer Success Team to a customer's FMX site. FMX will perform this service in the FMX offices and deploy this to the customer's account automatically. Customer may have to supply FMX with their desired changes to their FMX site. The time to complete this service varies widely from as little as 10 minutes to as long as 30 days.

Development Updates

Service is performed by the FMX Development team to perform a mass update to a customer's site. The service provided by the development team usually includes a change to the FMX software code. FMX will perform this service in the FMX offices and deploy this to the customer's account automatically. Customer may have to supply FMX with their desired changes to their FMX site. The time to complete this service varies widely depending on the customer requirement, which has spanned from 2 weeks to 30 days depending on many factors.

Data Management

The FMX Customer Success Team will perform the data management service and enter all data into a customer's FMX site not in the FMX acceptable data import formats. This service also includes a mass change in data to a customer's FMX site. FMX will perform this service in the FMX offices and deploy this to the customer's account automatically. Customer may have to supply FMX with their desired changes to their FMX site. The time to complete this service varies widely depending on the customer requirement, which has spanned from 2 weeks to 30 days depending on many factors.

*These services are available for an additional charge. To inquire about one of these services, reach out to your dedicated Customer Success Manager or Account Manager.

Watch our product tour

Want to see FMX in action? Watch our product demo, and experience an overview of our capabilities in full force.

www.gofmx.com/watchtour

Indicate how often upgrades are made to the system, including the testing processes used before implementation of an upgrade.

FMX is a software-as-a-service (SaaS) application that provides updates nearly every week. All systems and components are thoroughly tested prior to release. As a result, upgrades are seamless to our customers given the



nature of our architecture and automated deployment model. This ensures that our customers have the latest and greatest functionality and support.

Describe the reporting capabilities available to the customer. Provide sample copies.

FMX provides ad-hoc style reporting that can be published to Excel and PDF. FMX also provides interactive dashboard reporting to track KPIs.

Indicate how long ‘history’ records are maintained for use by the customer.

FMX can technically maintain an indefinite term of records, however provide best practices and specific techniques to each customer in terms of how those are stored, accessed, and managed. Most commonly we see customers seeking to maintain up to seven years of historical data, which again, has a recommended approach from FMX that works effectively.

Describe the system’s security capabilities and the privacy protection available to customers. This should include examples of secure authentication methods used (i.e. Password Authentication protocol, Multi-Factor Authentication, Single Sign-on, etc.).

Strong authentication and multi-factor can be enforced using single sign-on via SAML2.0, WS-Federation, and OAuth.

Provide website information to include administrative access to the site. Include instructions and screen shots for navigating the various site tools.

FMX is happy to setup a trial site for the AEPA and/or member agencies which includes guided support from one of our Solutions Engineers. Please contact Tyler Cantrell (Senior Solutions Engineer) at tyler.cantrell@gofmx.com to initiate this process.

Vendor must provide guidance on, support for, and pricing (if additional) for data- migration services to enable customers to move from legacy ticketing systems to the vendor’s solution.

FMX provides comprehensive data migration services and support for organizations transitioning from another CMMS and/or related ticketing system. This is priced as part of our one-time Implementation & Training fee.

Describe your company’s warranty policy for your product.

FMX is unique in that we make customer service our #1 priority. In the event that an AEPA member organization is not happy with our products and services, they may cancel at any time. While we have contracts, we do not believe in “vendor lock-in” for our customers and will not charge penalties in the event the services wish to be canceled by any customer organization.

Provide the estimated cost of major upgrades over the past three years.

FMX provides a software-as-a-service (SaaS) application whose costs have increased approximately 5% each year for the past three years. This helps us continue to deliver high-value solutions in the face of market inflation and other factors.



Provide the estimated hours per year spent performing data administration and backups.

FMX spends approximately 1-2 hours per year administering the process which is managed by Microsoft Azure who is our hosting provider.

Describe if this software will address FEMA reporting, procedures-protocol, and data collection for parts, equipment and support.

FMX can provide this as a commissioned report. Separate charges may apply.

Indicate if cloud computing/Software as a Service (SaaS) is an option with the proposed system.

Yes; FMX's solution is exclusively a cloud-based software-as-a-service application.

Software must support data collection and retention that is in line with FEMA reporting procedures/protocol in case of a FEMA disaster.

FMX can provide this as a commissioned report. Separate charges may apply.

Training, Support, and Additional Services Available

Describe any training services available to customers. This should include the 'standard' package for startup and training of clients including system installation and training for system administrators and all system users. Include samples.

FMX provides a comprehensive implementation and training package. This includes key steps like data migration, administrator training, staff training, site configuration, workflow reviews, single sign-on, and more. Our services are custom-tailored to the needs of each organization and are typically completed in 60 days for most customers, 90 days for larger, enterprise-size customers.

List any additional training services and costs available to customers.

FMX provides additional services such as onsite implementation and training, facility condition assessments (FCA), and specialized training services each with a separate cost. These each vary based on the needs of the customer.

List any available update and support contracts, including policy and frequency, for your program.

FMX provides product updates nearly every week to ensure the latest and greatest performance, availability, and functional support for our customers. FMX is happy to provide a copy of our Master Services Agreement (MSA) that contains additional information on support policy and other details.

Describe your return policies for instances where a customer buys your program and determines that it does not meet their requirements. Include policies for monetary refund, timeframe, and any associated limitations.

FMX is unique in that we make customer service our #1 priority. In the event that an AEPA member organization is not happy with our products and services, they may cancel at any time. While we have contracts, we do not believe in "vendor lock-in" for our customers and will not charge penalties in the event the services wish to be canceled by any customer organization. We are open to refunds or other concessions should the situation warrant it for the rare occurrences we've seen.



Submit a preliminary plan on how you would help the AEPA rollout this program to the AEPA member organizations and their affiliated educational institutions.

FMX has a highly experienced marketing organization with an extensive background in rolling out large scale national and global sales, marketing, and customer programs. Our approach would be to partner with AEPA leaders, officials by state, and other constituents to produce a communications and enablement program designed to inform everyone of their opportunities with FMX and how we can serve them. These materials would include specific details about our products, services, business benefits, technical details, and more as agreed with AEPA leaders and other stakeholders. A combination of remote (e.g. email, webinar, website) and in-person (e.g. training, education, seminars) would be among the deliverables we are considering.

Include information on any additional services you will provide through this contract if awarded.

FMX is fully-committed to the K-12 and education market. We invite the opportunity to engage with AEPA leaders and other stakeholders about additional products and services that may help your states and members. We seek a long-term partnership, not just a set of transactions.

Distribution

Describe how your company proposes to distribute the products and services nationwide, regionally, or at the local level.

FMX's solution is exclusively a cloud-based software-as-a-service (SaaS) application that can easily be distributed nationwide and does not require onsite implementation services. We also host regional educational events, provide each customer account management services, and provide best practices guidance to all of our customers.

Service/Support and Distribution Centers: Provide the type (service/support or distribution) and location of centers that support the United States by completing the following: *(To insert more rows, hit the tab key from the last field in the State column.)*

Center Type	City	State
Headquarters	Columbus	Ohio

Describe the criteria and process by which your company selects and approves subcontractors, distributors, installers, and other independent services.



FMX almost exclusively sells directly to our customers. Presently the only approved distributor of FMX products and services is Veregy. We have an extensive vetting process to evaluate any partner organization who wishes to market, sell, and service FMX products. However, all post-sale professional and customer services are currently provided by FMX.

Provide a list of current subcontractors, distributors, installers, and other independent service providers who are contracted to perform the type of work outlined in this solicitation in the member agency states. Include, if applicable, contractor license or certificate information and the state(s) wherein they are eligible to provide services on behalf of the business.

N/A; FMX is prepared to perform all services contained in this RFP response.

If applicable, describe your company's ability to do business with manufacturer/dealer/distribution organizations that are either small or MWBE businesses as defined by the Small Business Administration.

FMX is prepared to work with - or alongside - any business who serves the AEPA and your constituents. We have no such limitations of who we can and will work with to serve customer members.

If applicable, describe other ways your company can be sensitive to a participating agencies desire to utilize local and/or MWBE companies, such as the number of local employees and offices with a geographic region, companies your firm uses that may be local (i.e. delivery company), your own company's diversity of owner employees, etc.

FMX will remain sensitive and supportive of participating agency's needs and desires and will consider what we're asked of in supporting these initiatives.

If applicable, provide details on any products or services being offered by your company where the manufacturer or service provider is either a small or MWBE business as defined by the Small Business Administration. Provide product/service name, company name and small/MWBE designation.

FMX is not a small nor a MWBE business.

Marketing

Key Marketing Contact(s): List the name(s), title(s) and contact information of the business's key national and regional marketing office(s). *To insert more rows, hit the tab key from the last field in the Email column.*

Name	Title	Phone	Email
Alayna McCurry	VP Marketing	740.816.9684	alayna.mccurry@gofmx.com



Abigail Haberski	Senior Field Marketing Manager	614.915.2139	abigail.haberski@gofmx.com
Marc Stitt	Chief Strategy Officer	614.309.5998	marc.stitt@gofmx.com
Dr. John Bailey	National Director, K-12 Business Development	757.592.3742	
Darin Porter	Executive Director	740.935.5682	darin.porter@gofmx.com
Matt Pace	K-12 Practice Leader	480.848.2961	matt.pace@gofmx.com

Describe how this business marketed its products and services to schools, nonprofit organizations, and other public sector audiences in Fiscal Year 2022– 2023 (July 1 – June 30). List all conventions, conferences, and other events at which this company exhibited.

FMX has an extensive marketing organization and conduct marketing activities spanning digital marketing, field marketing, social media marketing, and more. We are proud to support the following associations and events with whom we partner with and have exhibited at during the timeframe requested.

- TASA
- NSPMA
- TSPMA
- PETE&C
- Cincinnati FM Expo
- CASH Conference
- TASBO
- Facilities Professionals Conference (IASBO)
- PASBO
- ILAPPA
- Indianapolis FM Expo
- NJSBGA Annual Conference/Expo
- NFMT
- Az ASBO Spring Conference
- OASBO
- Oregon Schools FM Association
- Kansas ASBO - Vendor Expo Partner
- UASBO
- MoASBO (Missouri)
- TEMA Conference
- Michigan School Business Officials
- Alabama ASBO
- Colorado ASBO
- IASBO Annual Conference
- Minnesota ASBO Annual Spring Conference
- KASBO



- MASBO Annual Institute
- WASBO Spring Conference
- Maryland ASBO Spring Conference
- NCSPMA
- TSPMA Summer Conference
- Northeast Buildings & Facilities Management Trade Show
- VSCMA School Plant Operation & Maintenance Conference
- AASBO
- PA Educational Leadership Summit
- FSPMA
- Buildings NY
- 2022 NY Council of School Superintendents Fall Leadership Summit
- MSPMA
- ERAPPA 2022
- ACUHO-I/APPA Housing Facilities Conference
- NCSPMA Eastern Convention
- TASA/TASB Convention
- NSPMA Leadership Academy
- Ohio Restaurant Association Expo
- IFMA's World Workplace (Nashville)
- Oklahoma ASBO
- SRAPPA Conference (HURRICANE - DIDNT ATTEND)
- MSBO Facilities/Operations Director Conference
- WAMOA Fall Conference
- MASMS
- RTM
- NYSSFA School Facilities Management Conference & Expo
- VSPMA
- KADPF Technical Conference
- CASBO Session 9:00am
- Central Ohio Facilities Maintenance Expo
- KSPMA
- GA Association of School Facility Administrators
- CFX 2022
- PASBO Facilities, Transportation and Safety Conference & Exhibits
- TASBO Operations Conference
- WASBO Facility Masters Conference
- MAPPA/MiAPPA 2022
- OPFMA Annual State Conference
- Grand Rapids onsites



- Building Operating Management's NFMT
- VENDOR DAY (CSBGA)
- New Haven Onsite
- MFAA & MASBO Tuesday Nov 15
- IAAPA
- Future of Education Technology Conference (FetC)
- TASA Midwinter Conference 2023
- MISBO 2023 FACILITIES CONFERENCE
- NSPMA 2023
- NSPMA Hospitality Event
- PETE&C 23
- OETC 23
- TASBO 2/2023
- Cincinnati Facilities Maintenance & Management Expo
- MSBA - Mississippi
- CASH Conference on School Facilities 2023
- CASH Golf Tournament
- Campus Energy 2023
- Northern New England Facility Masters Conference (NHASBO)
- IASBO: Facilities Professionals Conference
- WASBO Facilities Management Conference
- SCAPPA
- PASBO
- PFMA (Plant & Facilities Maintenance Association) Expo
- IFMA Seattle: Powerful Facility Energy Conference
- NJSBGA Conference & Expo 2023
- NFMT 2023
- KSPMA Professional Development Conference
- Utah Facilities Operation & Maintenance Association
- California ASBO Annual Conference
- IFMA's Facility Fusion® Conference & Expo
- IAAPPA (Iowa)
- Colorado ASBO Spring Conference & Exhibits
- Oregon School Facilities Association
- OASBO Annual Conference
- Alabama School Plant Manager Association
- TAPPA
- Los Angeles County Office of Education Green Schools Symposium
- LOUISIANA SCHOOL FACILITY MANAGERS ASSOCIATION
- 2023 MSBO Conference Exhibit Show & Sponsorship



- Florida Buildings Engineering & Facility Maintenance Show
- CT ASBO Vendor Day
- WPFDA Vendor Show
- Washington ASBO
- Illinois ASBO "Marketplace"
- RTM Dallas
- WASBO Spring 23
- Northwest Facilities Expo
- NCAPPA
- Tri-State ASBO Conference
- West Coast Buildings and Facilities Management Trade Show & Conference
- NCSPMA Western Convention/Workshops
- TSPMA
- MSSPMA
- TASBO Summer Solutions Conference
- Association For Learning Environments (GA) Summer Conference
- WVASFA
- 2023 SUNYPPAA/NYAPPA Annual Summer Conference
- MiAPPA Summer Conference (Michigan)
- MAPT - Maine School Transportation Safety Conference & Trade Show 2023
- Arizona ASBO (Summer 23)
- Higher Ed Summit
- 2023 National School Safety Conference
- Campus FM Technology Association 2023 Annual Conference
- One Water Technical Conference & Expo
- FSPMA
- Northern California Facilities Expo
- Rocky Mountain APPA - 2023 Conference
- GASFA (State, not School) Fall Conference
- Oklahoma School Plant Managers Association
- MSPMA
- Midwest APPA (MAPPA)
- IFMA's World Workplace 2023 Conference & Expo
- ICMA Annual Conference
- KADPF
- CAPP (Central) 2023 Conference
- MSBO Fall Conference
- ACUHO-I/APPA Housing Facilities Conference
- WAMOA
- MASMS Fall Conference



- North Texas Facilities Expo
- NCACCFO Fall Conference 2023
- PASBO Facilities, Transportation & Safety
- CASH Fall Conference
- Central Ohio Facilities Maintenance Expo
- MFAA & MASBO Vendor Day
- Southwest Buildings & Facilities Management Trade Show & Conference
- KSPMA Fall Conference
- Ohio Municipal League Annual Conference - 2023
- TASBO: School Operations Conference
- ASBO International Conference
- GASFA
- NFMT Remix (Orlando)
- 2023 MISBO ANNUAL CONFERENCE
- OPFMA Annual Conference
- SRAPPA
- Midwest Facility Masters Conference
- Community College Facility Coalition
- CSBGA Vendor Day
- Capital Buildings, Engineering, & Facility Maintenance Show
- MMA Annual Meeting & Trade Show
- PETE&C 2024
- PASBO Annual Conference
- NFMT 2024
- KYSTE (Kentucky Society of Technology in Education)
- 2024 TAPPA
- California ASBO
- IFMA Facility Fusion 2024
- WPFDA Vendor Show

Describe how your company will market the resulting contract to eligible Member Agencies. Describe how your company differentiates the new agreement from existing contracts that your company may hold today. Please be specific and detailed in your response.

FMX will commit to providing extensive marketing support to advertise, promote, and enable customers to use the contract resulting from this RFP. We are prepared to promote the AEPA and related agencies nationally, by state, by association, or otherwise at all FMX sponsored and hosted events. Key deliverables include, but are not limited to, website presence on gofmx.com, customer-facing flyers and brochures, presentation and session content, trade show signage, and more.



Cooperative Marketing. Describe ways in which your company will collaborate with AEPA Member Agencies in marketing the resulting contract. Submit any supplemental materials as PDFs and title it Exhibit A – Marketing Plan.

- Process on how the contract will be launched to current and potential agencies.
- The ability to produce and maintain in full color print advertisements in camera-ready electronic format, or electronic advertisements, including company logos and contact information.
- Anticipated contract announcements, planned advertisements, industry periodicals, other direct or indirect marketing activities promoting the AEPA awarded contract.
- How the contract award will be displayed/linked on the Respondent’s website.

Upon contract award, FMX senior leadership will collaborate with the AEPA and Member Agencies to understand all of the opportunities to market the resulting contract. Once we understand the rules, guidance, and approach, we will deploy national, state-based, and other strategies to promote our contract award. We also commit to a feature on our website’s education-focused pages (e.g. K-12) in a prominent position for all viewers. We also commit to all media types requested, such full color advertisements, camera-ready formats, or other electronic mediums. We have an extensive and capable marketing team with the full scope of modern design and development technologies.

Environmental Initiatives

Describe how your products and/or services support environmental goals.

FMX can help our customers support their environmental goals by helping them set goals and measure against them through work order management and recurring task workflows. Additionally we provide utility tracking to help our customers track costs and optimize usage and have a unique capability to align facility schedules with building automation systems such to turn on/off lights, HVAC systems, and more. Thus conserving energy use.

Indicate if your company has any products in your offering that have any third-party environmental certifications.

N/A; FMX does not have such certifications due to the nature of our business (e.g. software and services).

Describe the business’s “green” objectives (i.e. LEED, reducing footprint, etc.).

N/A; FMX does not have such objectives due to the nature of our business (e.g. software and services).

Describe what percentage of your offering is environmentally preferable and what are your company’s plans to improve this offering.

N/A; FMX does not have such percentages due to the nature of our business (e.g. software and services).



Additional Information

Describe any/all features, advantages and benefits of your organization that you feel will provide additional value and benefit to a participating AEPA agency.

FMX is unique in that our entire company is focused on K-12/education. Beyond the benefits drive from our purpose-built software solutions - contained in this RFP response - we also provide industry and market expertise through our Evangelist team, comprised of former K-12 and education facilities, maintenance, and operations leaders. This team is available to consult, present, and offer insights to the AEPA and member agencies at any time.

If applicable, describe your company’s ability to integrate into other ecommerce sites:

1. Include details about your company’s ability to create punch out sites and accept orders electronically (cXML, OCI, etc.).
2. Provide detail on where your company has integrated with a public agency’s ERP (Oracle, Infor Lawson, SAP, etc.) system in the past and include some details about the resources you have in place to support these integrations. List, by ERP provider, the following information: name of public agency, ERP system used, “go live” date, net sales per calendar year since “go live”, and percentage of agency sales being processed through this connection.

FMX as a company has the ability to integrate with other ecommerce sites, however have not done so with any partners to this point. If this is a requirement we are happy to discuss the scope and consider options to comply with these needs. We would like more clarity on this specific request to better understand why this would be necessary or beneficial.

Disclosures

References

Provide contact information of your business’s five largest public agency customers.

Agency	Name	Title	Phone Number	Email
1. Winston-Salem Forsyth County Schools	Justin Dyson	Director of Maintenance Operations	336-661-4999	jwdyson@wsfcs.k 12.nc.us



2. Iredell-Statesville School District	Tim Ivey	Chief Technology, Facilities, and Maintenance Officer	704-873-3755	tivey@iss.k12.nc.us
3. Grand Prarie Independent School District	Danielle Harris	Auxiliary HR/Systems Manager	972-343-4432	Danielle.Harris@gpisd.org
4. Buncombe County Schools	Clark Wyatt	Director of Maintenance	828-255-5921	clark.wyatt@buncombecounty.org
5. Johnston County Schools	Matt Hobgood	Executive Director of Facilities Services	919-934-6031	matthobgood@johnston.k12.nc.us

Service Questionnaire

The following chart indicates which AEPA Member States intend to participate in this solicitation category. Respond to Yes/No and choice questions by using an (X). **Note: A Respondent must be willing and able to deliver the proposed products and/or services to 90% of the participating AEPA Member States.**

AEPA Member States	Participating in this category.	In which states has this company sold products/services in the past 3 years? (Place an X where applicable)	If awarded, which states does this company propose to sell in? (Place an X where applicable)	Indicate which states this company has sales reps, distributors or dealers in. (Place an X where applicable)
California	Yes	X	X	
Colorado	Yes	X	X	X
Connecticut	Yes	X	X	
Florida	Yes	X	X	
Georgia	Yes	X	X	
Illinois	Yes	X	X	
Indiana	Yes	X	X	
Iowa	Yes	X	X	
Kansas	Yes	X	X	
Kentucky	Yes	X	X	
Massachusetts	Yes	X	X	
Michigan	No	X	X	
Minnesota	Yes	X	X	
Missouri	Yes	X	X	
Montana	Yes	X	X	



Nebraska	Yes	X	X	
New Jersey	Yes	X	X	
New Mexico	Yes	X	X	
North Dakota	Yes		X	
Ohio	Yes	X	X	X
Oregon	Yes	X	X	
Pennsylvania	Yes	X	X	
South Carolina	Yes	X	X	
Texas	Yes	X	X	
Virginia	Undecided	X	X	X
Washington	Yes	X	X	
West Virginia	Undecided	X	X	
Wisconsin	Yes	X	X	
Wyoming	Yes		X	

e-Commerce: Does this business have an e-commerce website? **No** X **Yes**

If YES, what is the website? www.gofmx.com

Customer and Support Service: It is understood depending on the type, kind and level of products and/or services being proposed in response to this solicitation will impact and determine the type and level of services required and these are identified in Part B Specifications of this solicitation.

Does this business have online customer support options? **No** X **Yes**

Does this business have a toll-free customers support phone option? **No** X **Yes**

Does this business offer local customer and support service options? **No** X **Yes**

State your normal delivery time (in days) and any options for expediting delivery.

FMX is a software-as-a-service (SaaS) application and can be fully implemented in a remote way, therefore delivery times and shipping don't specifically apply.

State your backorder policy. Do you fill the order when available, or cancel the order and require participating agencies to reorder if items are backordered?

N/A; FMX does not have backordering issues due to the nature of our business (e.g. software).

Describe your company's payment terms as well as any quick pay discounts.

FMX has a net 30 payment term with no quick pay discounts.



State your company’s return policy and any applicable restocking fees.

N/A; FMX does not have backordering issues due to the nature of our business (e.g. software).

Describe any special program that your company offers that will improve customers’ ability to access products, on-time delivery, or other innovative strategies.

N/A; FMX does not have backordering issues due to the nature of our business (e.g. software).

Pricing

Will your pricing methodology guaranteed for the term of the contract?	_____	No	X	Yes
Will you offer customized price lists to participating entities as required per the pricing terms of Part A?	_____	No	X	Yes
Will you offer hot list pricing (optional) as described in the pricing terms of Part A?	_____	No	X	Yes
Will you offer volume price discounts as described in the pricing terms of Part A?	X	No	_____	Yes

Competitiveness: In order for your response to be considered, your company must offer AEPA prices that are equal to or lower than those normally offered to individual entities or cooperatives with equal or lower volume.

Is the pricing that is proposed to AEPA equal to or lower than pricing your company offers to individual entities or cooperatives with equal to or lower volume?	_____	No	X	Yes
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Indicate which of the following apply and the **level of competitive range** you are offering in response to this solicitation.

 X Pricing offered to AEPA is EQUAL TO pricing offered to individual customer and/or cooperatives.

 Pricing is LESS THAN individual customer and/or cooperatives. Lower by %

Cooperative Contracts: Does your business currently have contracts with other cooperatives (local, regional, state, national)?	_____	No	X	Yes
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If YES, identify which cooperative and the respective expiration date(s).

TIPS: 5/31/27 ([Details](#))

1GPA:5/12/25 ([Details](#))

If YES, and your business is awarded an AEPA contract, explain which contract your business will lead with in marketing and sales representative presentations (sales calls)?

FMX will lead with this AEPA award and contract for all eligible states.

Administrative Fee: Which of the following best reflects how your pricing includes the individual AEPA Members' administrative fee. Mark with an "X".

	The pricing for the products and/or services are the same for each AEPA Member Agency, shipping, handling, administrative fee and other specific state costs are added to arrive at total price offered to the Individual AEPA Member Agency.
	The pricing for the products and/or services is inclusive of the administrative fee and therefore the pricing is the same for all AEPA Member Agencies. Shipping, handling and other state specific costs are added to the adjusted AEPA Member Agency's price.
X	The pricing for the products and/or services includes ALL (shipping, handling, administrative fee, other) costs to arrive at a single price for all AEPA Member Agencies.

Leasing: Do your business offer leasing arrangements under this solicitation? **X** **No** **Yes**
 If Yes, please indicate how the rate factor is determined and other cost factors below.

[Click or tap here to enter text.](#)

If an AEPA contract is approved and awarded by the Member Agencies, as a Vendor Partner, I agree to:

Responsibilities	Yes, indicate with an "X"	No, indicate with an "X"
1. Designate and assign a dedicated senior-level contract manager (one authorized to make decisions) to each of the Member Agency accounts. This employee will have a complete copy and must have working knowledge of the AEPA contract.	X	
2. Train and educate sales staff on what the AEPA contract is: including pricing, who can order from the contract (by state), terms/conditions of the contract, and the respective ordering procedures for each state. It is expected that Vendor Partners will lead with AEPA contracts.	X	
3. Develop a marketing plan to support the AEPA contract in collaboration with respective AEPA Member Agencies. The marketing plan should include, but not	X	



be limited to, a website presence, electronic mailings, sales flyers, brochures, mailings, catalogs, etc.		
4. Create an AEPA-specific sell sheet with a space to add a Member Agency logo and contact information for use by the Member Agencies and the Vendor Partner’s local sales representatives to market within each state.	X	
5. On a quarterly basis, complete the sales and administrative fee report (see attached PDF example) and submit to each Member Agency along with the respective administrative fees to be paid. If there are no sales, the Vendor Partner is required to submit a \$0 report to the AEPA Member Agency.	X	
6. Have ongoing communication with the Category Oversight Chairperson, AEPA Member Agencies and the Member Agencies Participating Entities.	X	
7. Attend two (2) AEPA meetings each year (see Part A)	X	
8. Participate in and/or support AEPA’s attendance at national conference trade shows to promote the AEPA contract.	X	
9. Commit to a goal of increasing sales of the AEPA contract over the term of the contract with all participating AEPA Member Agencies.	X	

Exceptions

Instructions:

1. Mark “No” or “Yes” with an “X” below.
2. If “yes” is marked with an “X” below, insert answers into the form shown below, providing narrative explanations of exceptions. *(To insert more rows, hit the tab key from the last field in the last row and column.)*
3. If adding pages, the company name and identifying information as to which item the response refers must appear on each page.
4. Exceptions to local, state or federal laws cannot be accepted under this solicitation.

X	No , this respondent does not have exceptions to the Terms and Conditions incorporated in Parts A and B of this IFB.
	Yes , this respondent has the following exceptions to the Terms and Conditions incorporated in Parts A and/or B of this solicitation.

IFB Section and Page Number	Outline Number	Term and Condition	Exception



Deviations

Instructions:

1. Mark “No” or “Yes” with an “X” below.
2. If “yes” is marked with an “X” below, insert answers into the form shown below, providing narrative explanations of deviations. *(To insert more rows, hit the tab key from the last field in the last row and column.)*
3. If adding pages, the company name and identifying information as to which item the response refers must appear on each page.
4. Deviations to local, state, or federal laws cannot be accepted under this solicitation.

X	No , this respondent does not have deviations (exceptions or alternates) to the specifications listed in Part B of this solicitation.
	Yes , this respondent has the following deviations to the specifications listed in Part B of this solicitation.

Outline Number Part B	Specification (describe)	Details of Deviation

